

Donor Voice

The Experience and Relationship Company



Five ways to deliver true supporter-centric journeys

Because one size fits no-one

What is a donor journey?

It is convenient to think of donor journeys as one size fits all. You come up with the message you want to project, you send it to everyone (or some transaction-based subset like “donors in the past 24 months), and you get back some returns. Everyone wins!

In reality, no one wins. We are all unique human beings, so one size fits none of us. We have our unique reasons for giving, levels of commitment to and knowledge about the organizations, preferences for hearing from the organization and so on.

Thus began the idea of donor journeys – the idea that different donors should have different paths through the organization based on the things that made them the same as people in group A and different from people in group B. This is always done with the best of intention, with a goal of giving people better experiences and getting more for your mission as a result.

However, there are many pitfalls in such a process. You could focus on what you suspect rather than what you actually know. You could pick reasons to segment that don’t differ or have suspect reasons to believe (like personas, demographics, and typing tools). You could use third-party data. You could forget to focus on experiences or focus on experiences that don’t matter. Or you could think that more is better in your donor communications, trying to fill every minute with the donor communication of the moment.

We hope to help you avoid those pitfalls with five simple rules to journeys. Then, instead of what not to do, we’ll look at what a positive donor journey process would be.

Rule #1: Do your homework

An international relief organization once did an interesting test. They had their staff rate 20 potential appeals; they then asked donors to do likewise. The top three appeals according to donors were ones the staff ranked in the bottom seven. And the staff’s favorite appeal was the donor’s second worst.

In other words, even if we know we aren’t the donor, we can’t necessarily replicate who the donor is.

It requires work to get this. Each of us has hundreds of identities we have at any given time. How we use them is based on what priming we have and what situation we are in. That’s because it’s important not to have your sports fan identity come out at your parent-teacher conference; it’s important to quibble with the teacher about how your child is assessed differently from how you quibble with the referee about how that call was assessed.

There are similarly hundreds of potential identities that could be reasons that people give to you. It requires significant research to find the truly valuable identities, which are the ones that:

- Have a significantly higher (or lower) value than other identities
- Are attached to the reason to give. You certainly have a segment of donors who are parents. But if people don’t give because they are parents, that’s not relevant to their experience.
- Require different messaging. If an identity responds to the same messaging as everyone else, there’s no value in segmenting them out. It’s only those donors who have different reasons for giving and thus require special message that require their own donor journeys.

A sure sign that an organization knows what they are doing with their segmentations is that their segments have names that describe an identity and/or a behavior. For a nature organization, it could be “outdoorspeople” versus “armchair enthusiasts.” Quick! To whom are you marketing the nature hike, field glasses, and opportunity to tour a nature preserve? Right! And you also know to whom to send the email about the documentary that features your work on the NatGeo channel or the book about environmental issues.

You can do similarly with the level of commitment to the organization: your diehards demand different communications than those who you are trying to get to become diehards. One organization tested cultivation touches to their new donors. Specifically, they tried three conditions:

- No additional no-ask cultivation touches
- Six additional no-ask cultivation touches
- 12 additional no-ask cultivation touches

Results? No one wanted 12 additional cultivation touches – retention went down in all cases. And there was no aggregate difference between no additional touches and six additional touches for retention rate – a nail in the coffin for the volume = retention maxim.

But wait! When donors were broken down by commitment level, we found that highly committed donors – the ones we all really want to retain – had their retention drop by nine points when they got six additional touches. They were already convinced and didn’t need to be sold. For them, the organization was paying to dissuade their best donors.¹

Those less committed, however, needed the extra touches – the six additional communications meant a 12-percent increase in retention. Here, the extra communications solidified a shakier relationship and were well-worth sending.

You’ve probably gotten about everything of value you can out of treating your donors the same. Whether by identity, commitment level, or some other measure (although we’ll have some cautions about other types of segmentation in rule #3), your aim in life should be to get additional value from your donors by treating them differently.

You should be able to look at a map of your donor journey, expand it to two rows instead of one, treat a segment differently, and (most importantly) get more value out of your file as a result. That’s a result that can only come from research-based insights like the DonorVoice Commitment Study that look at why people give to your organization and what’s important to them.

Rule #2: Avoid common insight traps

Insight trap A: Personae non grata.

Stop me if this looks familiar:

“Anna and Ben are 32-year-old Millennials who are drawn to the advocacy portion of your mission. They live in a growing urban area (Seattle? Portland? Nashville? Austin?) and volunteer locally. They try to shop at local stores and are more likely to buy from companies that are socially responsible. When they give, they want to see a concrete impact from their gift. They want their giving to be easy and online; they want their nonprofit activities to be fun.”

¹ <https://www.institute-of-fundraising.org.uk/blog/how-amnesty-increased-first-year-f2f-retention-by-12-points/>

If it does sound like a familiar persona, you have our pity. This was made up in two minutes while waiting for a meeting to start by taking one demographic variable and extrapolating with some data and some stereotype.

That's the downside of personas. You are given a name and a cluster, but the data is all demographic and transactional. Those can tell you "what" and a bit about "who". They can't tell you why. Other differences between personas and identities:

Identity is based on first-party data (what the donor tells you). Personas are based on second- or third-party data. Because of this, identity is more certain. Ninety-nine percent of the people who say they are interested in advocacy are interested in advocacy (I'm assuming 1% user error). However, if you get someone who looks demographically like an Anna above, the persona will tell you she is more likely to be interested in advocacy. But that could mean if 20% of your file is interested in advocacy, she has a 25% chance of being interested. "More likely" doesn't mean "is" like a persona would have you believe.

Identity is tied to a reason they give to you. Personas describe a person absent their reason for giving. If you work for a disease charity, a persona will tell you many things, but it won't disclose the most important thing – whether the donor has the disease or cares about someone who does. That's the single greatest predictor of giving – that's donor identity. And without it, the persona doesn't help you address this person.

Likewise, a persona won't tell:

- A hospital about whether someone was a patient
- A museum about whether the person had visited
- An animal charity about whether they had adopted a shelter pet or whether they prefer cats or dogs
- A relief organization whether the person prefers to give internationally or domestically

And on and on. Because personas are built from external data, they can only guess at the "why". That means:

Identity allows for specific messaging. Personas don't. Take another look at the persona above. What would you do differently for this person? Perhaps make sure they get advocacy alerts (which you could determine more accurately by asking). Perhaps get their email address and correspond with them online (which you can determine more accurately by asking). Perhaps show them the impact of their gift (which you should do anyway).

Whereas when you have different identities and reasons for giving, you soon wonder what you can get away with not customizing, because the differences are so stark. Do I always have to have different messaging for those who suffer from a disease and those who don't? No, there are likely some things in common (usually striving for a cure). Everything else, though, is specific to the type of person receiving it.

These are all reasons why for-profit CMOs are abandoning broad personas² and why deeper insight some from knowing why someone gives.

² <http://www.cmo.com/features/articles/2017/1/16/why-personas-dont-work-and-what-innovators-are-doing-differently.html>

Insight trap B: Demographics

Demographic segmentation was created to make personas look good. They are the second-best way to segment your file for a donor journey.

The best way, however, is literally almost any other way.

Take, for example, the experience of Todd Yellin, Netflix's VP of Product Innovation. Netflix has one of the great treasure troves of data out there. What does he use? Quote: "There's a mountain of data that we have at our disposal. That mountain is composed of two things. Garbage is 99 percent of that mountain. Gold is one percent... . Geography, age, and gender? We put that in the garbage heap. Where you live is not that important."³

Consider romantic comedies. Demographics and stereotyping would say to market these exclusively to women. This misses men who like romantic comedies and women who hate them. Netflix, wisely, markets romantic comedies to people who watch romantic comedies.

As should you. There's little difference between this and the broad stroke segmentation practiced at some nonprofits where men get address labels with anchors and women get labels adorned with flowers.

The reason these segments don't work out is surprisingly simple: there's more difference within these demographic groups than between/among them. Consequently, they are not predictive.

As marketing professor Mark Ritson puts it in Marketing Week: "If your segment is populated by different people who want different things, it is not a segment. It's a joke and so are your skills as a marketer."⁴

The reason is because there's no way you can effectively change your messaging based on that type of segmentation, which is the point of doing segmentation in the first place.

AND...the chaos within demographic clusters isn't solved by getting ever more granular. You could make your head hurt by trying to figure out the difference among "Red, White, and Blues," "Heartlanders," and "Blue Highways" (three real segments from PRIZM social groups). The truth is that even if I'm the same age, sex, gender, sexual orientation, etc., as my neighbor, if I'm caring for a loved one with Alzheimer's and he isn't, the way we react to an Alzheimer's charity will be entirely different.

This most vital of differences will also be entirely invisible to demographics.

Even broad stroke attitudinal segments outperform demographics ones. NonProfit Tech for Good's Data for Good looked at differences in giving behavior among groups segmented by gender, age, and ideology. The greatest difference between men and women in giving behavior was 20%. The greatest difference between Millennials and Boomers in giving behaviors was 32%. But the difference between liberals and conservatives was 300%.⁵

Ideology isn't even a great predictor as to which organizations a person will give. But it's still an order of magnitude more predictive than demographics, which are often based on pseudoscience. For example,

³ <http://fortune.com/2016/03/27/netflix-predicts-taste/>

⁴ <https://www.marketingweek.com/2017/07/26/mark-ritson-stereotypes-segmentation/>

⁵ <https://www.slideshare.net/nonprofitorgs>

in the demographic of “age” alone, there’s a Strauss-Howe generational theory — that every 20 or so years, there is a new generation. They further posit that there are four generational patterns in rotation: prophets, nomads, heroes, and artists.

So, for example, according to them, the “Silent Generation” are prophets, the idealists that helped create the post-war establishments that Baby Boomers, as nomads, rebelled against. “Gen Xers” are the heroes, who grow up increasingly protected, but mature into self-reliance. “Millennials” are artists, who “grow up overprotected by adults preoccupied with the crisis, come of age as the sensitive young adults of a post-crisis world.”

Sounds about right, right?

Well, I lied. In Strauss-Howe generational theory, Silent Generation members are artists, Baby Boomers are prophets, Gen Xers are nomads, and Millennials are prophets.

In the end, the whole thing reads like that Chinese zodiac printed on a restaurant placemat: vague enough to apply to anything— or to nothing.

And the results, when you try to use them, are as accurate as acting based on that slip of paper inside a fortune cookie.

Insight trap C: Typing tools

In the course of your nonprofit career, impressive firms with marble floors in their HQ will offer you the “opportunity” to create a typing tool. What they are really offering is the opportunity to pay for the marble floor in their new satellite office.

A typing tool sounds seductive: have your donor answer a few questions, throw in some black box modeling, and you can get to deeper insights. Think of the “Which Harry Potter character are you?” quizzes you see online.

There are couple of flaws with this. First, these models obscure donor-given data. We worked with a charity who will remain nameless who had one of these typing tools. One of the questions was whether someone had been to their museum. Because the model “knew” that older folks were more likely to have been to the museum, older people who hadn’t been to the museum were put into a “museum attendee” segment; conversely younger people who had been to the museum were encouraged to come to the museum **for the first time**.

There are larger sins in marketing than treating someone the exact opposite of who they told you they are. But none you’d want to commit.

Consider if a disease organization tried something like this, where all their older donors were treated like they had the disease and the younger ones were treated like they didn’t and you can see the multi-car marketing pile-up in action.

It would be far easy to listen to the donor and treat them how they want to be treated, no?

The other challenge here is the lack of transparency. If a donor tells you they are a cat person and you treat them like a cat person, they like it. You used their input and know them better as a result. If you treat that same donor like a cat person and you didn’t tell them that, it’s either inaccurate or creepy. Not the choice you want the donor to have to make.

All these methods are tempting. It would be easy if a persona, a demographic variable, or a black-box algorithm could tell you what you needed to know about the donor. But, alas, you will have to go through the hard work of asking them, especially when you see the state of third-party data.

Rule #3: Build your own data garden

A July 2018 report from Deloitte looked at how accurate commercially available data is. Considering the title of the report is Predictably Inaccurate⁶, you can likely guess what's coming, but even we third-party data cynic, were boggled:

- 59% of those responding to the study (these were Deloitte professionals who were given their own profiles sourced from a mainstream data broker) reported that the demographic data obtained from brokers to be 50% or less accurate — even for simple, easily available data like date of birth, marital status, and # of adults in household).
- 84% said data-broker data was 0-50% correct about their economic data. So beware that wealth append you just did.
- 75% said their vehicle data was over less than 50% correct, including 44% who said it was zero percent correct. (Consider that, in the United States, 22% of cars are white, 40% of all vehicles are SUVs, and 14% are Fords. Thus, if we guessed you drove a white Ford SUV, we'd only be completely wrong 40% of the time. In other news, DonorVoice is willing to become your vehicle data broker.)

Less than 20% of people said their number of children was correct. Yet, 41% of mothers have two children, according to Pew surveys⁷ (yes, this assumes the person has children, but even correcting for this, you'd be better off guessing two rather than using a data broker).

The report is worth reading if only for some of the responses, which include these gems:

“It said I was single (I am married), I have no children (I have six), and I vote Democrat (I often vote Republican).”

“If my data is representative, this seems pretty useless.”

Most third-party data brokers are drawing from the same well, especially the data provided by the big three credit reporting agencies. So you can see exactly how accurate third-party data is for you at aboutthedata.com from Acxiom. (You do have to register, but what's the worst that could happen in the safe hands of one of the big credit reporting agencies?) (Don't answer that).

A DonorVoice staff member tried this and the data were, well, predictably inaccurate. The data says he:

- Has half the children I do (should have guessed two!)
- Votes for the other political party
- Was in his house for the wrong number of years (but had the date of purchase correct. How?! It's just subtraction!)
- Is in the market for female apparel (not that we know of)

⁶ https://www2.deloitte.com/content/dam/insights/us/articles/3924_Predictably-inaccurate/DUP_Predictably-inaccurate-reprint.pdf

⁷ <http://www.pewsocialtrends.org/2015/05/07/family-size-among-mothers/>

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- Doesn't donate to anything but political causes (there would be a bunch of nonprofits surprised by this...)
 - Likes cooking magazines
 - Loves gardening and crafts – doing them, reading about them, buying stuff for them

All demonstrably untrue. And yet, in all too many cases, these are the things we are feeding into our models. Then GIGO – Garbage In, Garbage Out.

How did big data get so polluted? The report covers that as well:

- Outdated information that isn't worth the cost of updating
- Incomplete information that isn't worth the cost of completing
- Incorrectly collating multiple data sources
- Incorrect inferences (think of what happens to your Amazon recommendations when you forget to mark something as a gift)
- Incorrect models
- Corruption by malicious parties

We'll add one more: lack of financial incentives to do better.

Most models are black boxes. You put your donors/constituents in, you get a score out. Easy peasy. And when we get it wrong, we don't know because the constituent who starts getting ads in Spanish or honor/memorial solicitations (both ads I now get from nonprofits) doesn't care enough to report back that they haven't lost a loved one or spontaneously learned to speak in a new tongue.

So this is a peek into how the sausage is made. Turns out there is some Upton Sinclair-level stuff going on –the digital equivalent of the slaughterhouses described in The Jungle. So dine on these data sausages at your peril.

But let's say these data were 100%. You'd still have trouble using them. First, the donor didn't tell them to you, so there's a creep factor. Second, they are only the type of demographic information that doesn't yield insights. Third, this road to insights is a toll road: every time you want data, you pay.

These services are walled data gardens. You can play all you want in the garden while you are there, but everything stays in the garden. From a marketer's perspective, however, they are more like a Roach Motel: data checks in, but it doesn't check out.

Imagine having to show up at a restaurant with raw chicken thighs, sea salt, and fennel. Then, they tell you how good the meal they cooked with it was. Then the bill comes.

You are also trying to build competitive advantage off common data. If you work at the Loving Shepard Foundation, your mortal enemies at the Shoving Leopard Foundation can work from the same hymnal as you.

Thus, you want to **grow your own data garden**. The right questions in the right context will be answered.⁸ And those who don't answer your questions are less valuable donors on average.⁹

⁸ <http://www.thedonorvoice.com/the-context-of-donor-surveys/>

⁹ <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4827627/>

More than that, getting these data from donors is engagement. There is nothing we humans like talking about more than ourselves. We are and will always be our own favorite topic. When it turns into data that can be used to improve our future experiences, so much the better.

This engagement helps. One for-profit company found that a single instance of asking for feedback cut attrition by 50% and increased revenue by 33%.¹⁰

The same is true for the nonprofit world. Capturing commitment and satisfaction up front allows you to fix issues for committed donors and fix systems to get and retain more of those donors. Amnesty Belgium increased their six-month retention rate from 60% to 80% by doing this.¹¹ They:

- Found commitment and satisfaction were the most predictive variables in their modeling, so if nothing else, they learned who was going to lapse.
- Reached out to committed donors dissatisfied with their interaction. These are the donors most likely to forgive and become productive long-term donors with a bit of apology.
- Rewarded those canvassers who brought in the most committed donors, not the most donors, because the fight against churn and burn fundraising begins at acquisition.

This creates a sustainable fundraising model based on the desires of donors. None of it is possible without reliable first-party data that engages on things – commitment, satisfaction, and identity – that only a donor will know.

Rule #4: Experience matters

Most charities lack a systematic, business process to measure the quality of an experience (and whether the ‘job’ was done) much less, to act on that data at the individual and aggregate level.

This type of measurement can pay dividends. For example, one of the most important drivers of a positive online experience is making the ‘checkout’ process quick and easy. If we don’t measure this, we assume (incorrectly) that everyone who hit the final ‘donate’ button was a success (and we have no record of those who abandon the page at all).

This is about both business process and, equally, supporter experience. Most complaints, issues, concerns and needs go unattended to because the supporter does not voice them. Why? We don’t make it as easy and convenient as possible. By putting an organizational emphasis on measuring and managing individual supporter experiences around individual touchpoints and interactions, we get greater engagement and greater insight and the opportunity to have one-to-one exchange tied to feedback. All this can be done with basic business rules (e.g., send email version A to those with a bad experience and Version B to those who had a good experience) and therefore, automated.

¹⁰ <http://agitator.thedonorvoice.com/dont-talk-to-me-when-im-not-listening-2/>

¹¹ <http://embed.vidyard.com/share/uVRyuLG2kz37Fo8N6rmmBy>

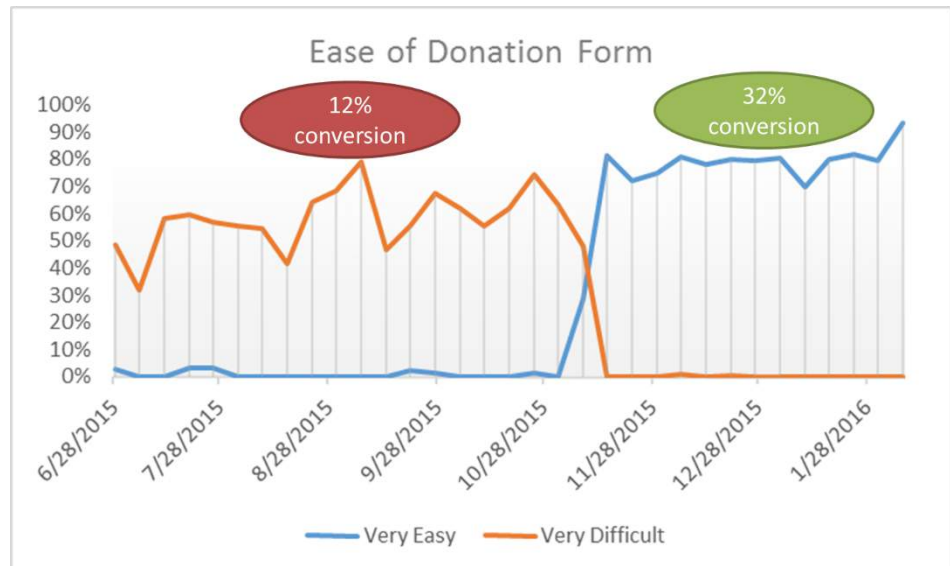
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Feedback data in aggregate (especially the unstructured, open-end comments tied to specific issues) is a gold mine for root cause analysis and efficiently making process-based changes tied to supporter experience. Make no mistake, this is about making money without ever asking for it. Case in point, the chart at right shows the easy/hard donor feedback rating over time from donors after making an online donation. The improvement (flip-flopping the easy/hard rating and the 20-percentage-point increase in conversion) came by mining the open-end comments about the process, structuring the data, and identifying the top pain point trends and systematically fixing those.

Along the way, every single supporter giving feedback was followed up with using business rules and automation and when the fixes were made those same

supporters were alerted to the improved user experience and credited (rightly) with making it possible. That email alone had a high donor conversion even though it contained no ask.



This measures whether an experience was satisfying; it doesn't measure whether it's important. That's where a DonorVoice Commitment Study comes in. It measures your donors' satisfaction on their experiences **and** how much each of those experiences matters to the donors.

The donor is hiring you to do a job. Broadly, this is to feel good about having an impact. But there are 1.5 million nonprofits in the U.S. alone that can do that. They are hiring you because of the specific impact you will have and the experiences you will give them. Using this jobs-to-be-done framework as posited by Clayton Christensen et al¹², we can look at more precisely why our donors are hiring us. Marketing professor Theodore Levitt once remarked that "People don't want to buy a quarter-inch drill. They want a quarter-inch hole." The idea is that you need to sell results, not the product or features.

If we can say we are effective at saving lives and changing lives, we are doing a good job of reporting how effective our drill is at making holes. That's the first step of why donors hire us, but it's not close to the whole story. As Christensen et al say, "Jobs are never simply about function – they have powerful social and emotional dimensions."

This all ties back to our donors' identities – who they are relative to our organizations and what we are helping them do.

For example, several organizations work right now to help with food, water, and basic educational needs in hard-hit South Sudan. The impacts a potential donor would be making, then, are similar.

And yet I'm doubtful there is a large overlap in the donors to South Sudanese relief efforts from Catholic Relief Services, Baptist Global Response, and Lutheran World Relief. Each of these sets of donors is

¹² <https://hbr.org/2016/09/know-your-customers-jobs-to-be-done>

saying something very similar, and very different, about themselves by the organization they choose to support.

To get committed donors – donors who will retain and upgrade and stick with you through the tough times – you need to understand what itch your donors are using you to scratch. It may be different reasons for different donors, just like different people want to accomplish different things with a drill. But that is the central mission we have. If we want people to use our organizations to do a job, we need to know what job it is they want us to do.

Thus, it's vital to measure experience – satisfaction with it and importance of it – in your donor journey process. It's even better to adapt your donor journey based on the measurement of your experiences.

Rule #5: Let it breathe

There is a natural tendency with journey planning or communication scheduling to start with a blank row, divided up by time (e.g. months, weeks) and fill it up. No blank space.

The problem? Continuous is not optimum. Who says? The commercial sector and a load of academic analysis, including within the charitable sector.

The upside of all this marketing is short term donations and brand building – i.e. staying in their consciousness. The downside? Yep, irritation that leads to attrition.

One way to address this is to shift from “continuous” marketing to a pulsing schedule. Pulsing is just what it sounds like. On and off. Repeat. Heavy “on” period to get sales/donations and build brand/stay in their consciousness followed by an off-period to avoid the negative of irritation and annoyance that leads to the much bigger financial loss – attrition.

This is not just theory. It is empirically proven, over and over and over. A large study looked at five Dutch charities over five years.¹³ The ‘optimum’ approach to raise the most money in the long-term **and** short-term was quarterly pulsing – one quarter on, one quarter off, repeat.

Nor is more better. There is ample evidence in support of over-soliciting (and communicating) leading to worse financial outcomes.

First off, there is an enormous amount of cannibalization with people merely shifting dollars. In one study¹⁴, researchers found that each additional mailing generated 1.81 Euro in revenues, but that 1.21 Euros of that was cannibalized from future mailings. Thus, only 37% of the revenues that are “new” when you add a mail piece are from that mail piece. The bottom line, there is no such thing as free lunch; you cannot sustainably grow short-term revenue by cranking out more solicitations. Not only is there a low ceiling of short-term revenue upside as you rob Peter to pay Paul but there is a very big, financial downside. The same thing that causes our “success” with short-term incremental revenue increases is also causing our failure in the form of lousy retention.

¹³

<https://econpapers.repec.org/scripts/redir.pf?u=https%3A%2F%2Frepub.eur.nl%2Fpub%2F571%2Ffeweco20020501140152.pdf;h=repec:ems:eureir:571>

¹⁴ <http://www.theagitator.net/wp-content/uploads/ERS-2010-015-MKT.pdf>

Why does this happen? In a word, irritation. And contrary to some pontificators, irritation impacts most supporters, not a tiny minority. Another study found that donors who have increased frequency to direct mail have increased irritation, decreased goodwill, and decreased likelihood of giving, quarter over quarter.¹⁵

When donors get too many communications, they also set up defense mechanisms. For those who think we're melodramatic, we're getting this from a study titled Defensive Responses to Charitable Mail Solicitations.¹⁶ These mechanisms include lists of when they donated list, a maybe box of appeals, limiting their giving to just certain types of charities, etc. The more mail they get, the more they agree with the statement "I feel I must protect myself from the mail I get from charities."

And before you email marketers think you are immune from defensive responses, look at your open rates, your click-through rates, and the industry deliverability rates. You are facing digital versions of these analog defensive responses.

The advantage of customized donor journeys is you need not blindly cut volume. Rather, you can customize message, amount, and medium by donor. Some examples:

Message. One UK animal organization asked people in the beginning of the call if they considered themselves cat people or dog people. There were then three versions of the script: one for cat, one for dog, and one for both/neither/declined. This simple change resulted in a 15% increase in response rate and a ten-pound increase in average annual gift.

In the United States, the ASPCA's "Tell us about yourself!" page that asks for identity and topic preference. From this information, they customized emails and subject lines to fit the cat versus dog preference of the donor. The response rates increased 230 percent as a result.

It's not just cats and dogs. When a child sponsorship organization realized many of their donors were parents looking to create an enriching experience for their own kids, a switch to more kid-focused mailings yielded substantially higher returns. When we customize to meet our donor's identity, we increase their giving. We also connect more to their heart, making ourselves a more indispensable part of their lives.

Amount. Catholic Relief Services actively asked their donors how often they would like to hear from CRS. Those donors who gave a mail preference, whether one, two, four, six, or 12 times per year, were six to eight times more valuable than the average donor. This is in part because CRS then asked those donors to set up a gift on a recurring basis (e.g., you'd like to hear from us quarterly; would you like to set up a quarterly gift?).

Similarly, the National Committee to Preserve Social Security and Medicare coded people who requested less mail and sent them half as many appeals as those who stated no preference. Those donors who requested – and received – half as many contacts gave more than the group that didn't express a preference.¹⁷ Failure to create a separate journey for these donors would have meant leaving this value on the table and these donors dissatisfied.

¹⁵ <https://econpapers.repec.org/paper/emseureir/571.htm>

¹⁶

https://www.researchgate.net/profile/Stephanie_Noble/publication/227945639_Defensive_responses_to_charitable_direct_mail_solicitations/links/57b5e18308ae19a365fc4d04.pdf

¹⁷ <http://www.theagitator.net/communications/raise-more-ask-less-part-4/>

Channel. One nonprofit built a telemarketing list containing nothing but folks who have indicated they will donate one time per year and only by phone. When telephoned that one time per year, the conversion rate on this list of donors posted a whopping 83%.¹⁸ The main message is a reminder of the donor's stated intent to give, and the phone call is their opportunity to do exactly what they intended.

Our goal, then, isn't necessarily the same as our mail or email consultants. They make money the more you talk to your constituents. You make money the deeper your communications go.

Summary: A process forward

So what does a considered donor journeys process look like?

It starts with current state – where you are – then works toward where you want it to be. Current state and desired state have the same building blocks:

- 1) **Touchpoints:** The formal, often “push-based” communications tied to calendar or triggered by an event (e.g., signup, one-off donation).
- 2) **Interactions:** Two-way exchanges either with a process (e.g. giving online) or with a human being (e.g., sponsor care interaction, F2F acquisition).
- 3) **Experiences:** For every touchpoint and interaction, the supporter has an experience. It's often fleeting (e.g., delete email, throw away mail piece) or passive and often subconsciously processed versus actively considered, but it's an experience nevertheless.

When journey mapping, you need to understand every touchpoint and interaction from the perspective of the business and the supporter. That includes both your perspective (e.g., channel, when sent, results, audience definition, what job you were looking to do with it, etc.) and your donors' perspectives (e.g., was a positive or negative experience, what motivation does it give you).

These data matter but they are only as good as the methodology, process and journey planning tool. We are biased, but our online planning tool is fit for one purpose: donor journey mapping. That means no more “round peg for a square hole” solutions (e.g., Excel, PowerPoint, Project Visio, pdfs, photos of sticky notes in a conference room). At the click of the mouse, we can switch from organizational, touchpoint mapping (first image) to a supporter-led Journey view (second image). Drag and drop and editing and customizing, all with a single purpose in mind, improving supporter experience by understanding it.

¹⁸ <http://www.slideshare.net/kschulman14/donor-voice-ask-less-make-morewhite-paper-final>

Donor Voice






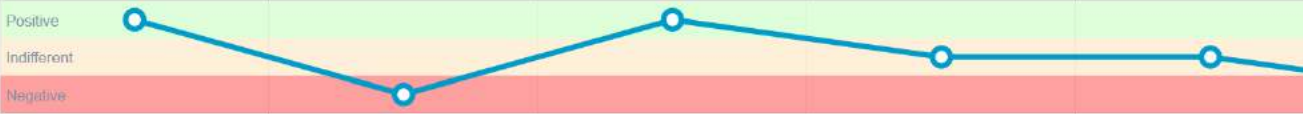
Plan Canada Donor Experience Map Detached Donor Segment

Maps

Journeys

Reports

Charts

TOUCHPOINT TITLE	Welcome Tote	Confirmation Email	Vendor Verification Call	Welcome Call	Welcome Email
TOUCHPOINT IMAGE					
JOB TO BE DONE	Establish Reciprocity, brand recognition	affirm details			
EXPERIENCE					
DONOR INSIGHTS	Keep	Fix	Keep	Fix	
SUPPORTER MOTIVATION	Hoping for Personal Connection				

Select Audience

Drop

Add

Filters

Story

Touchpoint Detail

Ask for Donation

Monthly Donor Ask

It's important once you have this map to create empathy with your donors. Often, when we present donor journeys, organizations have no idea how many or what type of communications their donors receive, siloed as they are among different channels, intended gift types (e.g., events, monthly, mid-level, planned giving, etc.), and departments (e.g., marketing, fundraising, communications). The organization should reflect on what job is each touchpoint trying to achieve and what the experience is like.

From there, don't try to boil the ocean – identify your top five opportunities based on your Commitment Study, your capacity, and your biggest pain points. Individuals can then brainstorm how we might address these opportunities, bringing them to the group for review.

Then, and only then, can you build your desired state. This state should have agreed-upon rationales for each of the changes, the roles, responsibilities and timeline for those changes, and suggestions for KPIs and outcome measures of success.

Finally, you test. Evidence-based, in-market change is the name of the game. You must create appropriate test and control panels, set up testing criteria, deliver a segmented journey, and evaluate whether the new state is preferable.

We'd also suggest being open to refinement mid-test. For example, we worked with Catholic Relief Services on a pilot program that was intended to be for two years. After one year, however, they felt they had enough information to call the test panel a success, so we helped them implement the new state and create the next test.

We hope this is helpful to your donor journey planning. We'd love to help you with any or all of these steps. If you have any questions about this, or anything you've read in this white paper, please feel free to contact any of us on the following page.

DonorVoice

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